


**Author:** Kristenson, Joel  
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## Overview

This article will teach you the steps to **insert donation transactions** into a letter using the **<<Contribution Table>> merge fields**. It includes instructions on how to **set the date-range** for the Contribution Table merge fields, and how to utilize the different **'Contribution Table'** merge fields when printing out letters.

This tool is often utilized when issuing your **year-end tax letters** for donors, but can be used in other circumstances too (for instance you may want to [thank donors](#) who gave last month, but include all of their prior donations for the year in the same letter a.k.a. a Year-To-Date Statement).

 **Tip:** Read [this article](#) for an in-depth tutorial on how to issue **year-end tax letters** to households and/or individuals.

## Example Print Preview

The following *example* shows how a finished **mail-merge letter** with donation **transactions** merged in might look:



19981 See Gull Rd  
Brainerd, MN 56401

Dear Steven Aakhus,

Your tax-deductible donations for 2016:

<u>Date</u>	<u>Amount</u>
02/13/2016	\$400.00
02/20/2016	\$50.00
06/27/2016	\$45.00
12/05/2016	\$1,000.00
Total	\$1,495.00

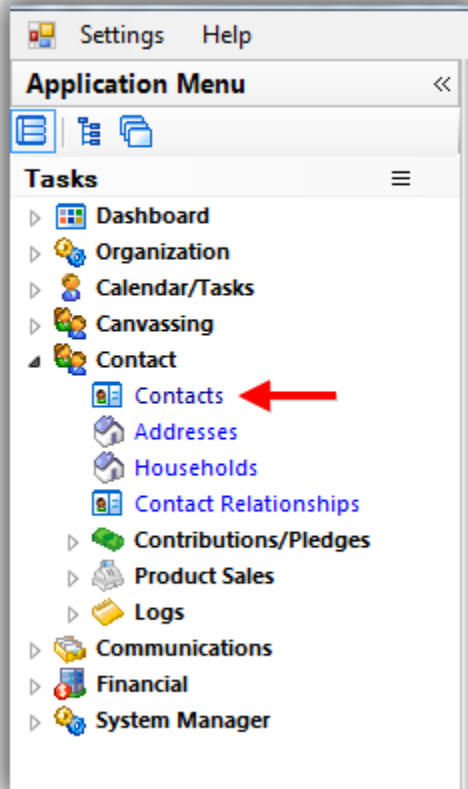


**Example transactions merged into a letter using the <<ContributionTableWithinDateRange>>**

KNOWLEDGE BASE [www.trailblazer.com/kb](http://www.trailblazer.com/kb)

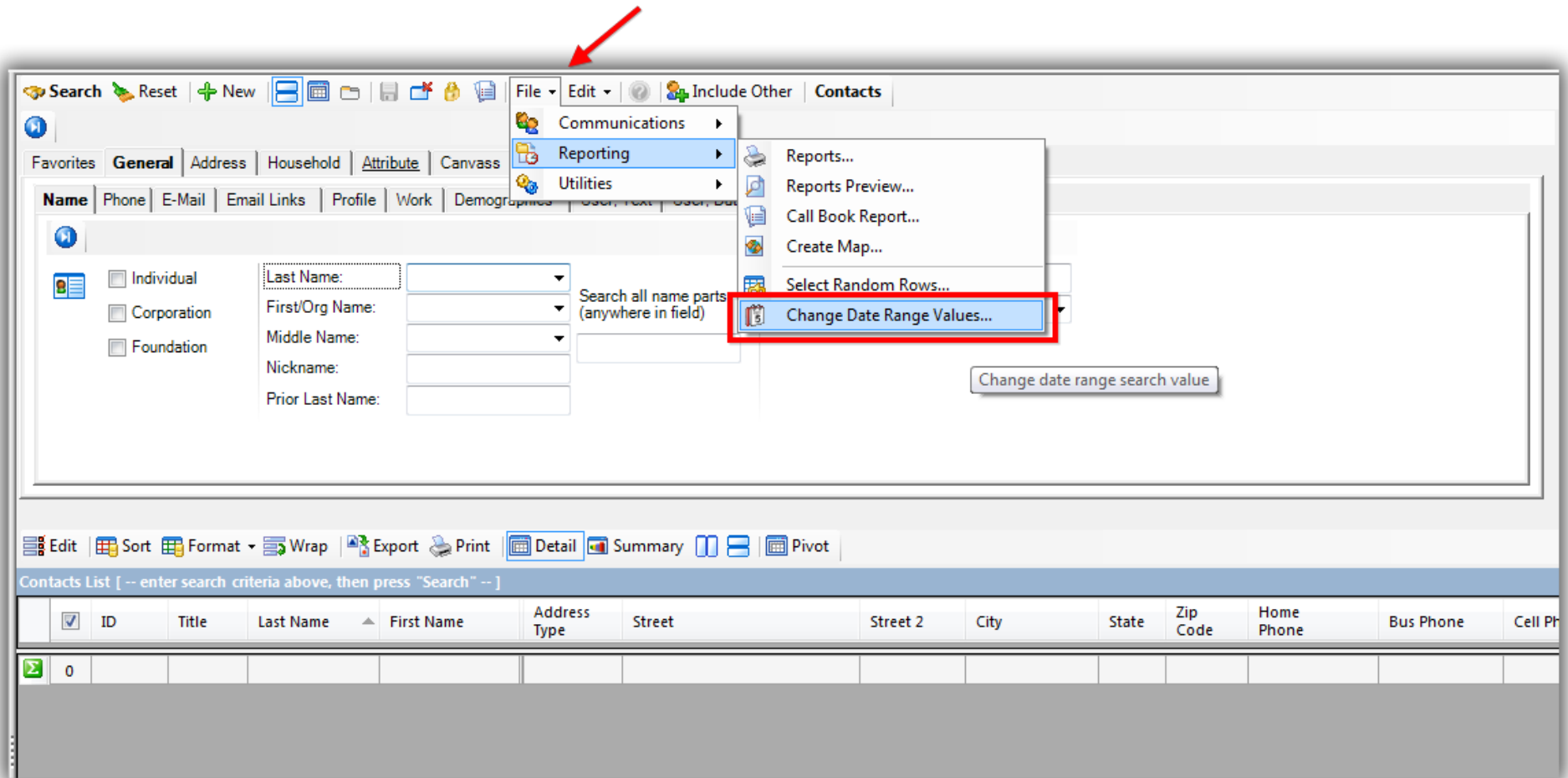
## Steps

Open the **Contacts** (Donors/Voters) list.



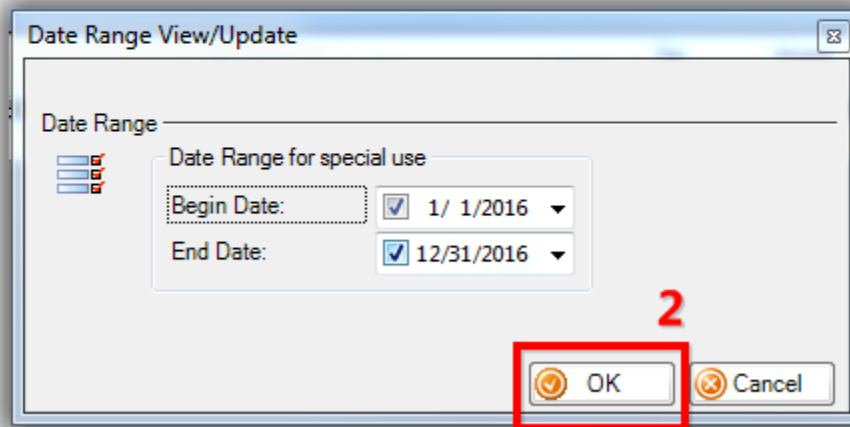
Click **File > Reporting > Change Date Range Values...**

## Inserting Donation Transactions into a Mail-Merge Letter (Primarily for Nonprofits)



Enter the **date-range** you want donation transactions to **print out** for and then click **[OK]**. *In this example I selected 1/1/2016 – 12/31/2016.*

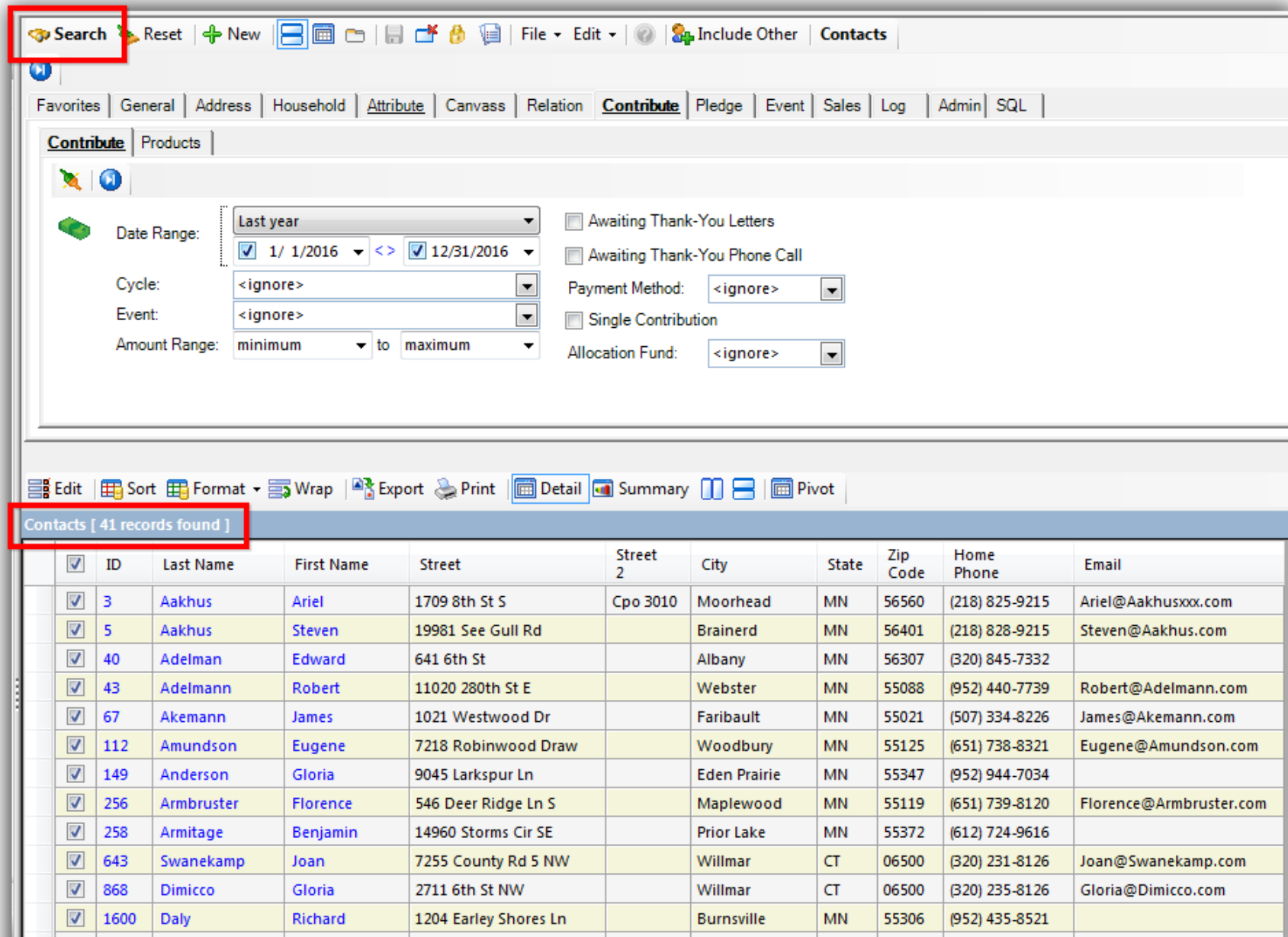
## 1. Enter the date-range that you want donation transactions to print out for.



**Note:** Don't confuse this with the **search query date range**. Most often it will be the same, but not always. For instance, you could query for those people who donated this month, but still report 'all' their donations for the year-to-date (or lifetime).

After setting the date range to print transactions for, **build** and **run** your [search query](#) for the donors you want to send the letter to. *In this example I searched for all donors who gave in 2016.*

**Build and run your search query for the donors you want to write a letter to.**



The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, Include Other, and Contacts. Below this is a sub-menu with options like Favorites, General, Address, Household, Attribute, Canvass, Relation, **Contribute**, Pledge, Event, Sales, Log, Admin, and SQL. The main area is titled 'Contribute' and contains various search filters:

- Date Range: Last year (dropdown), 1/ 1/2016 (checkbox), 12/31/2016 (checkbox)
- Cycle: <ignore> (dropdown)
- Event: <ignore> (dropdown)
- Amount Range: minimum (dropdown) to maximum (dropdown)
- Awaiting Thank-You Letters (checkbox)
- Awaiting Thank-You Phone Call (checkbox)
- Payment Method: <ignore> (dropdown)
- Single Contribution (checkbox)
- Allocation Fund: <ignore> (dropdown)

Below the filters is a toolbar with options like Edit, Sort, Format, Wrap, Export, Print, Detail, Summary, and Pivot. A red box highlights the 'Search' button in the top menu and the 'Contacts [ 41 records found ]' header above the table. The table below shows a list of donor records with columns for ID, Last Name, First Name, Street, Street 2, City, State, Zip Code, Home Phone, and Email.

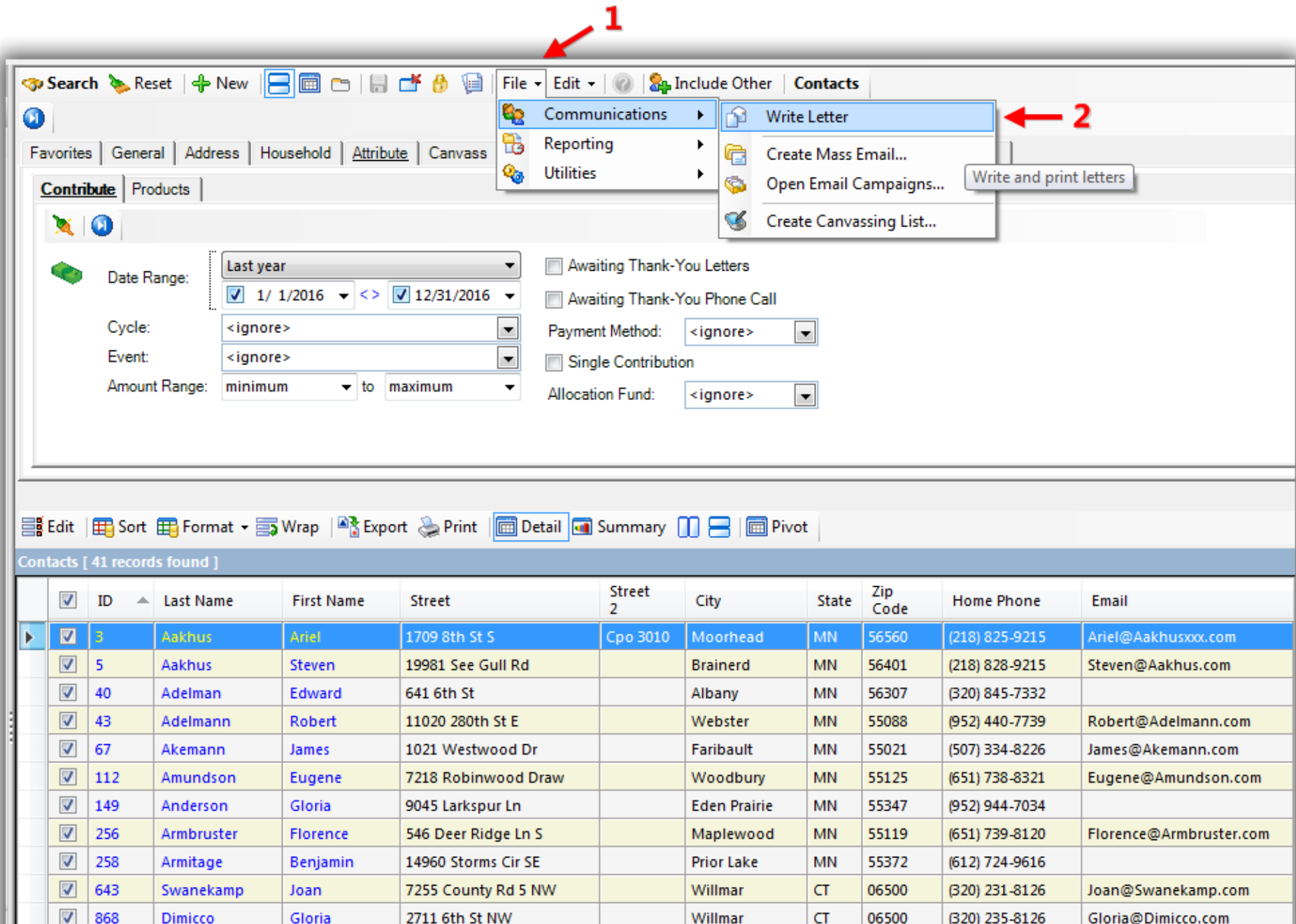
ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email
3	Aakhus	Ariel	1709 8th St S	Cpo 3010	Moorhead	MN	56560	(218) 825-9215	Ariel@Aakhusxxx.com
5	Aakhus	Steven	19981 See Gull Rd		Brainerd	MN	56401	(218) 828-9215	Steven@Aakhus.com
40	Adelman	Edward	641 6th St		Albany	MN	56307	(320) 845-7332	
43	Adelmann	Robert	11020 280th St E		Webster	MN	55088	(952) 440-7739	Robert@Adelmann.com
67	Akemann	James	1021 Westwood Dr		Faribault	MN	55021	(507) 334-8226	James@Akemann.com
112	Amundson	Eugene	7218 Robinwood Draw		Woodbury	MN	55125	(651) 738-8321	Eugene@Amundson.com
149	Anderson	Gloria	9045 Larkspur Ln		Eden Prairie	MN	55347	(952) 944-7034	
256	Armbruster	Florence	546 Deer Ridge Ln S		Maplewood	MN	55119	(651) 739-8120	Florence@Armbruster.com
258	Armitage	Benjamin	14960 Storms Cir SE		Prior Lake	MN	55372	(612) 724-9616	
643	Swanekamp	Joan	7255 County Rd 5 NW		Willmar	CT	06500	(320) 231-8126	Joan@Swanekamp.com
868	Dimicco	Gloria	2711 6th St NW		Willmar	CT	06500	(320) 235-8126	Gloria@Dimicco.com
1600	Daly	Richard	1204 Earley Shores Ln		Burnsville	MN	55306	(952) 435-8521	

results



Select **File > Communications > Write Letter.**

# Inserting Donation Transactions into a Mail-Merge Letter (Primarily for Nonprofits)



The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the 'Write Letter' option is highlighted. A red arrow labeled '1' points to the 'File' menu, and another red arrow labeled '2' points to the 'Write Letter' option. A tooltip 'Write and print letters' is visible next to the 'Write Letter' option.

The interface includes a search bar, a toolbar with icons for Search, Reset, New, and other functions, and a menu bar with options like File, Edit, and Include Other. The 'File' menu is expanded, showing options like Communications, Reporting, and Utilities. The 'Write Letter' option is highlighted, and a tooltip 'Write and print letters' is visible next to it.

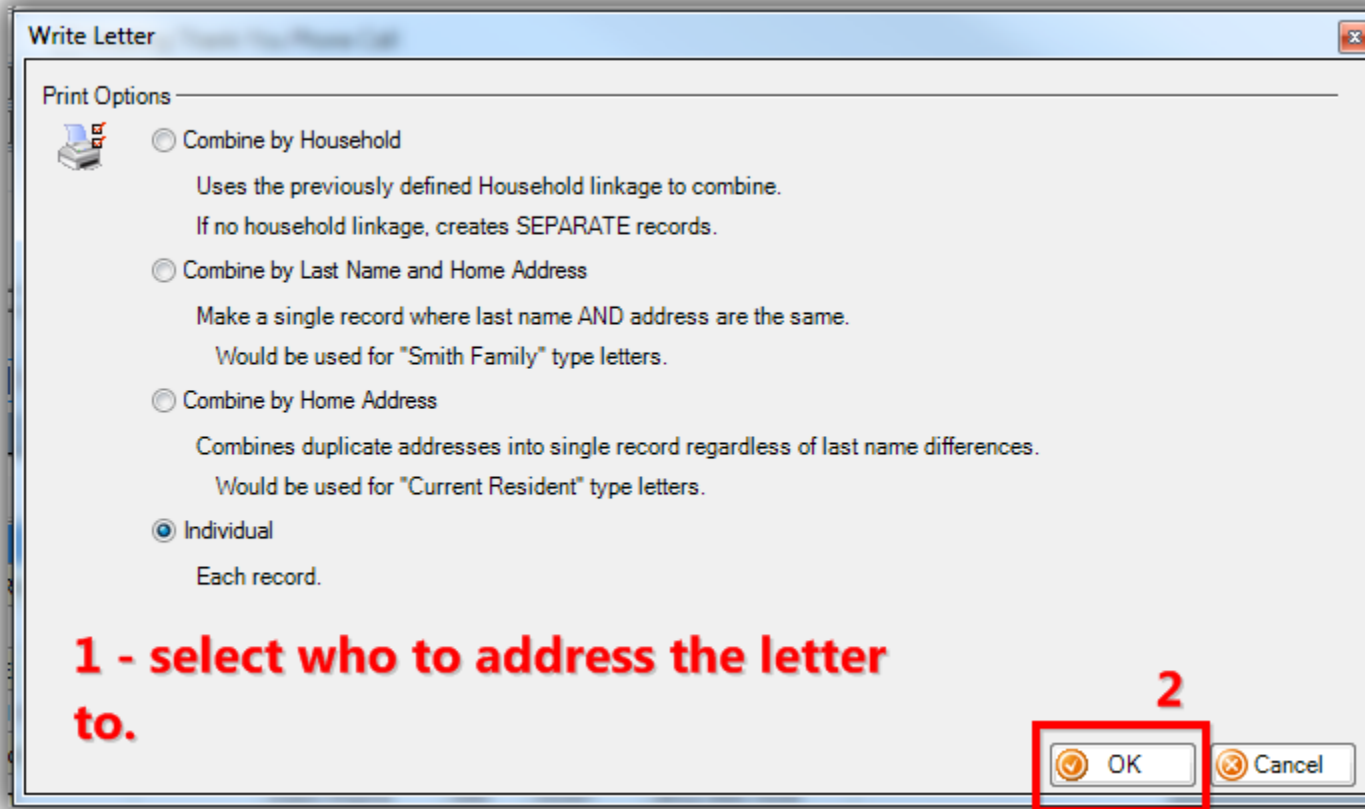
The main window displays a 'Contribute' section with various filters and options:

- Date Range: Last year
- Cycle: <ignore>
- Event: <ignore>
- Amount Range: minimum to maximum
- Awaiting Thank-You Letters:
- Awaiting Thank-You Phone Call:
- Payment Method: <ignore>
- Single Contribution:
- Allocation Fund: <ignore>

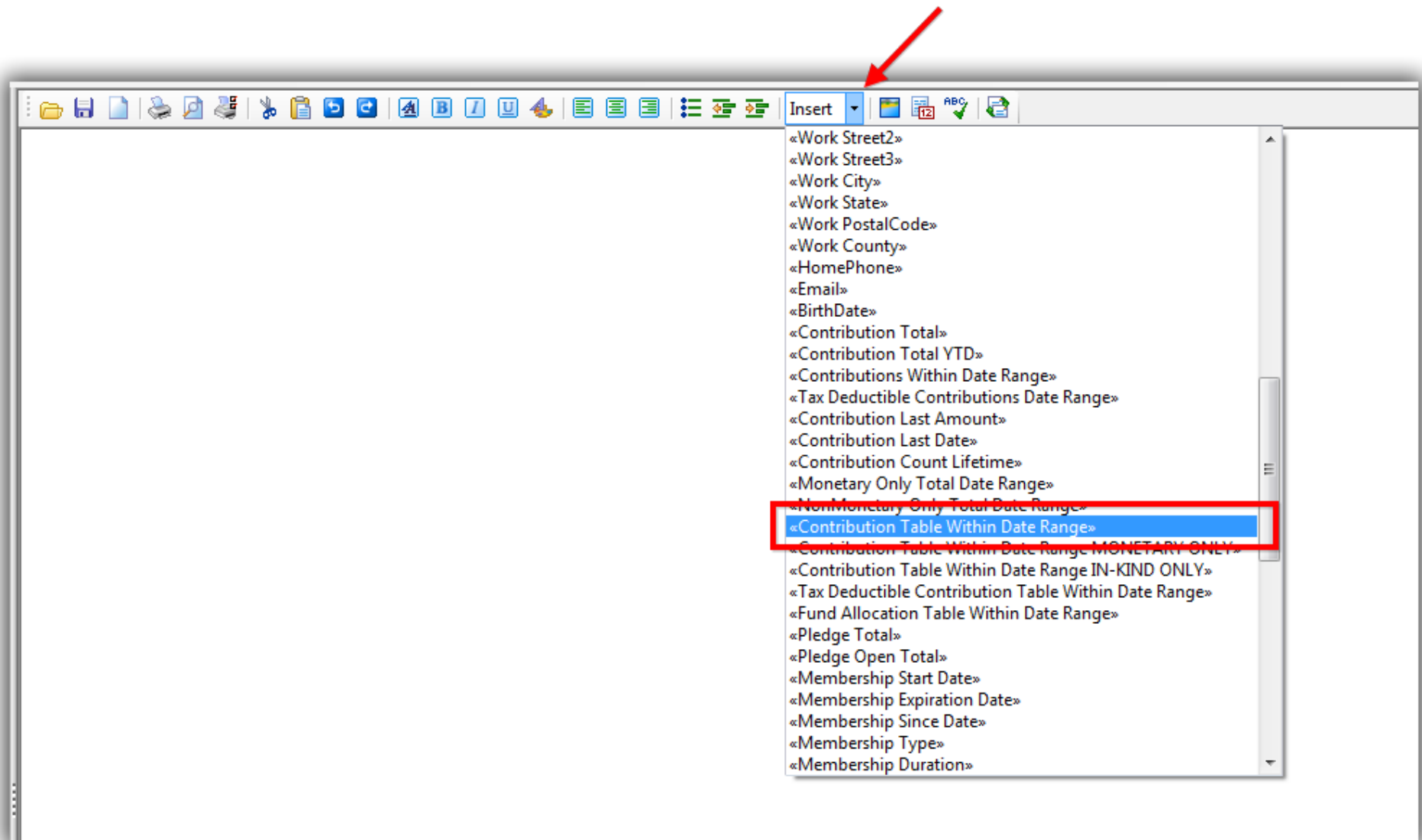
The bottom section shows a table of contacts with 41 records found. The table has columns for ID, Last Name, First Name, Street, Street 2, City, State, Zip Code, Home Phone, and Email.

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email
3	Aakhus	Ariel	1709 8th St S	Cpo 3010	Moorhead	MN	56560	(218) 825-9215	Ariel@Aakhusxxx.com
5	Aakhus	Steven	19981 See Gull Rd		Brainerd	MN	56401	(218) 828-9215	Steven@Aakhus.com
40	Adelman	Edward	641 6th St		Albany	MN	56307	(320) 845-7332	
43	Adelmann	Robert	11020 280th St E		Webster	MN	55088	(952) 440-7739	Robert@Adelmann.com
67	Akemann	James	1021 Westwood Dr		Faribault	MN	55021	(507) 334-8226	James@Akemann.com
112	Amundson	Eugene	7218 Robinwood Draw		Woodbury	MN	55125	(651) 738-8321	Eugene@Amundson.com
149	Anderson	Gloria	9045 Larkspur Ln		Eden Prairie	MN	55347	(952) 944-7034	
256	Armbruster	Florence	546 Deer Ridge Ln S		Maplewood	MN	55119	(651) 739-8120	Florence@Armbruster.com
258	Armitage	Benjamin	14960 Storms Cir SE		Prior Lake	MN	55372	(612) 724-9616	
643	Swanekamp	Joan	7255 County Rd 5 NW		Willmar	CT	06500	(320) 231-8126	Joan@Swanekamp.com
868	Dimicco	Gloria	2711 6th St NW		Willmar	CT	06500	(320) 235-8126	Gloria@Dimicco.com

Select who you want to write the letter to and click **[OK]**. *In this example I selected individual.*



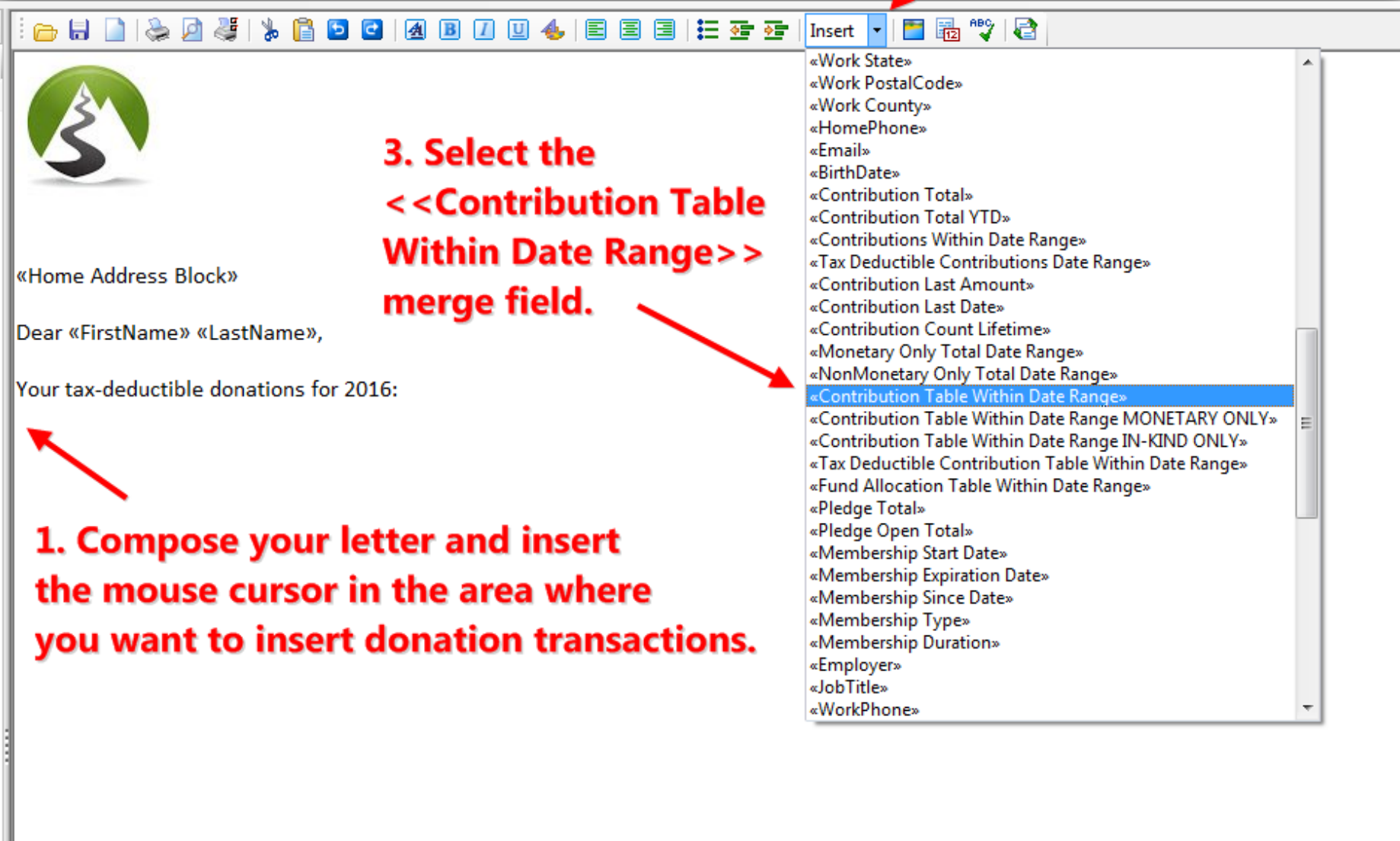
**Note:** There are a variety of **'Contribution Table' merge fields** you can use to insert multiple donation transactions into your letter, each with its own purpose. You can select them from the **Insert Merge Field** drop-down.



Begin composing your letter with your images, text, etc.

**Insert** the **mouse cursor** into the section where you want to merge in donation transactions, click the **[Insert Merge Field]** drop-down in the upper-right of the composer, and select the <<**Contribution Table Within Date Range**>> option. *My example is below.*

**2. Click the [Insert Merge Field] drop-down.**



**3. Select the <<Contribution Table Within Date Range>> merge field.**

**1. Compose your letter and insert the mouse cursor in the area where you want to insert donation transactions.**

«Home Address Block»

Dear «FirstName» «LastName»,

Your tax-deductible donations for 2016:

- «Work State»
- «Work PostalCode»
- «Work County»
- «HomePhone»
- «Email»
- «BirthDate»
- «Contribution Total»
- «Contribution Total YTD»
- «Contributions Within Date Range»
- «Tax Deductible Contributions Date Range»
- «Contribution Last Amount»
- «Contribution Last Date»
- «Contribution Count Lifetime»
- «Monetary Only Total Date Range»
- «NonMonetary Only Total Date Range»
- «Contribution Table Within Date Range»**
- «Contribution Table Within Date Range MONETARY ONLY»
- «Contribution Table Within Date Range IN-KIND ONLY»
- «Tax Deductible Contribution Table Within Date Range»
- «Fund Allocation Table Within Date Range»
- «Pledge Total»
- «Pledge Open Total»
- «Membership Start Date»
- «Membership Expiration Date»
- «Membership Since Date»
- «Membership Type»
- «Membership Duration»
- «Employer»
- «JobTitle»
- «WorkPhone»

**Note:** With **contribution table** merge fields it's **important** to change the **font type** to a **fixed-width** font ([monospaced](#)) so that it prints out on the letter with consistent spacing. The rest of your document can use **proportional fonts**.

### List of Fixed-Width Fonts (Monospaced) that Work in Trail Blazer

- Courier New
- Consolas
- Letter Gothic
- Lucida Console
- OCR-A

**Example:** Here's the same data first presented with a **proportional font**, and next by a **fixed-width** font:

Dear Steve,

The tables below detail your contributions for 2013:

<u>Date</u>	<u>Amount</u>	
03/02/2013	\$7,500.00	
03/04/2013	\$100.00	Other 1 Gifted us a new computer monitor. (quantity: 1)
Total	\$7,600.00	

**Proportional fonts**

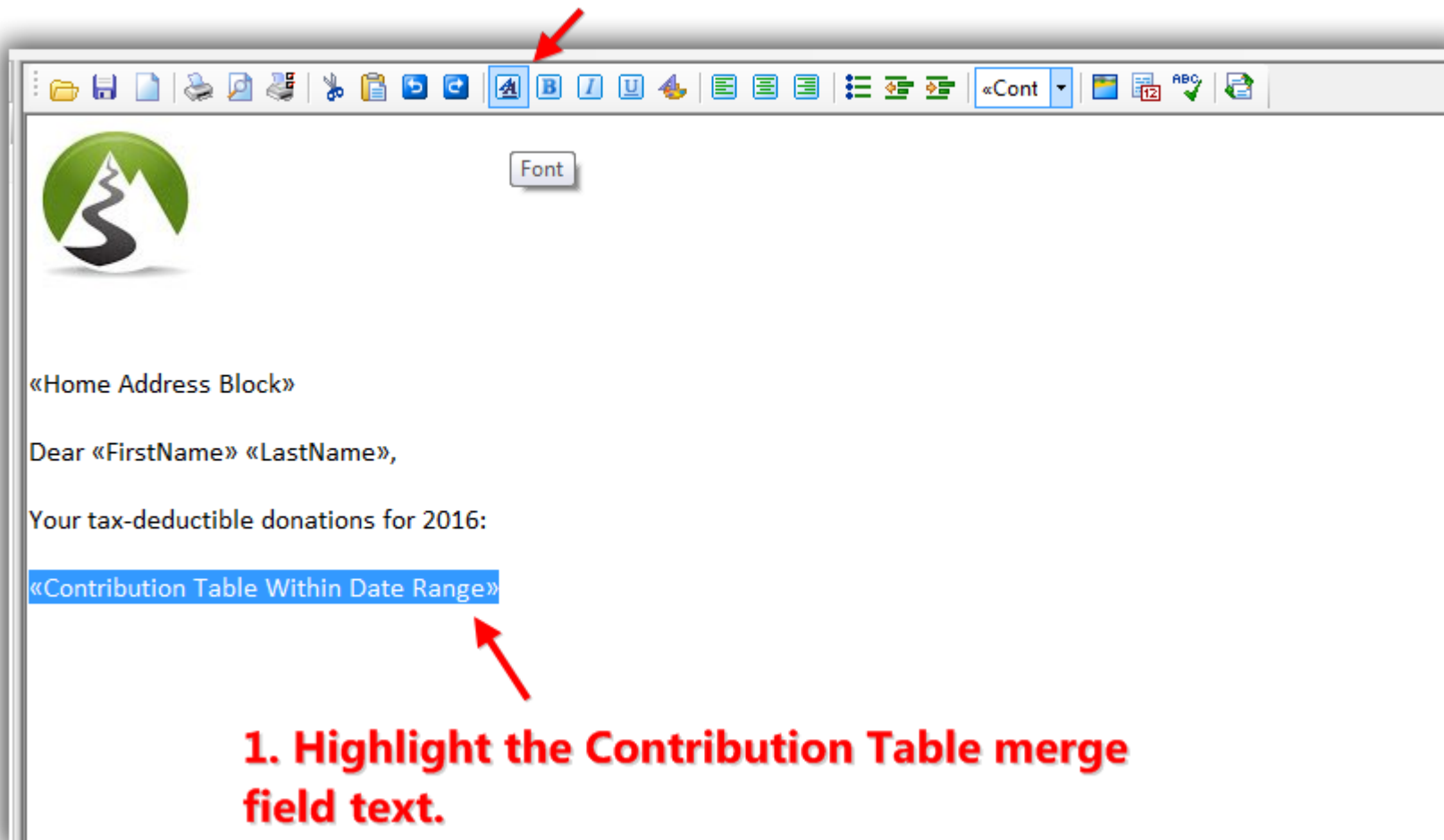
<u>Date</u>	<u>Amount</u>	
03/02/2013	\$7,500.00	
03/04/2013	\$100.00	Other 1 Gifted us a new computer monitor. (quantity: 1)
Total	\$7,600.00	

**Fixed width font**

Once the merge field is inserted into the letter where you want it, **highlight** the text, and then click the **[Font]** button.

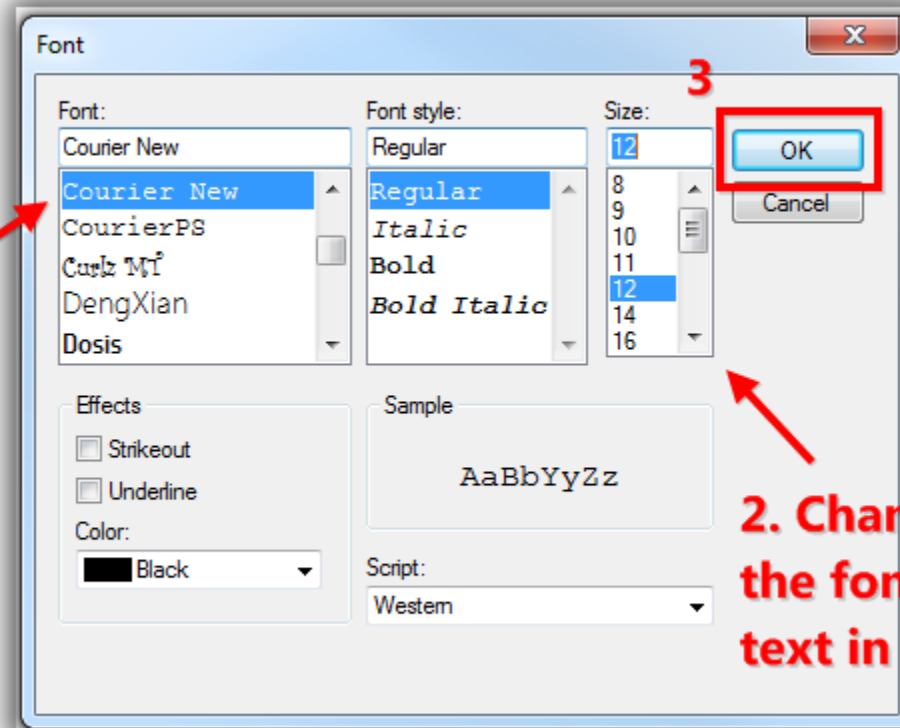


## 2. Click the [Font] button.



Select a **fixed-width** font type, select the **font size**, and then click **[OK]**. *In this example I selected the Courier New font type.*

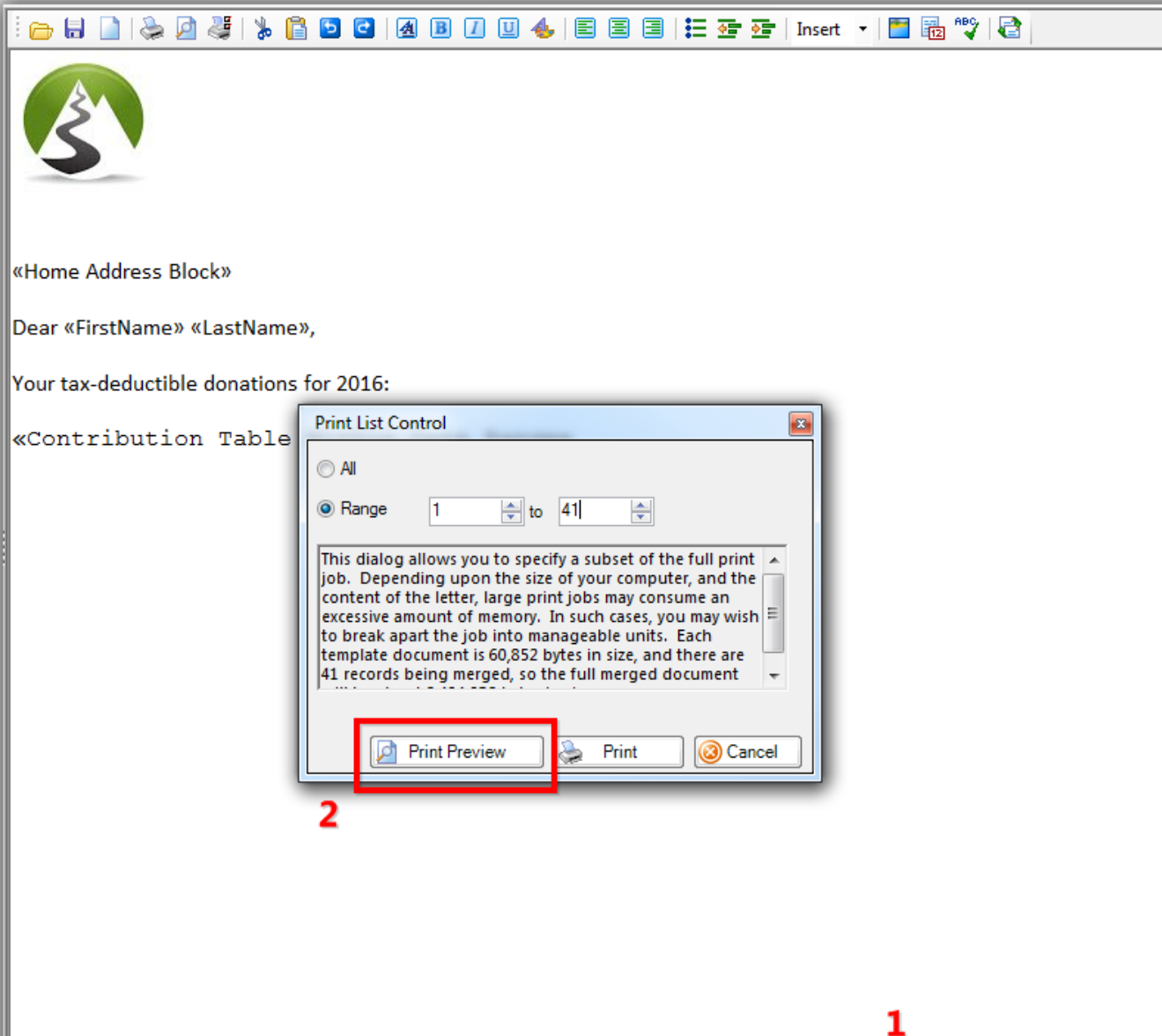
**1. Select a fixed-width font like Courier New or Lucida Console.**



**2. Change the size to match the font-size of the rest of the text in your letter.**

After modifying the font for the contribution table merge field, run a **print preview** by clicking **[Print] > [Print Preview]**. *If you're writing a large batch of letters you can set a range to run a test print of just a few.*

**After inserting the Contribution Table merge field and modifying the font you can run a test print to see how it looks.**



The screenshot shows a Microsoft Word document with a mail merge letter. The letter content includes a logo, a salutation, and a heading for a contribution table. A 'Print List Control' dialog box is open, allowing the user to select a range of records to print. The 'Range' option is selected, and the range is set from 1 to 41. The 'Print Preview' button is highlighted with a red box, and a red number '2' is placed below it. A red number '1' is located at the bottom center of the page.

«Home Address Block»

Dear «FirstName» «LastName»,

Your tax-deductible donations for 2016:

«Contribution Table»

**Print List Control**

All

Range 1 to 41

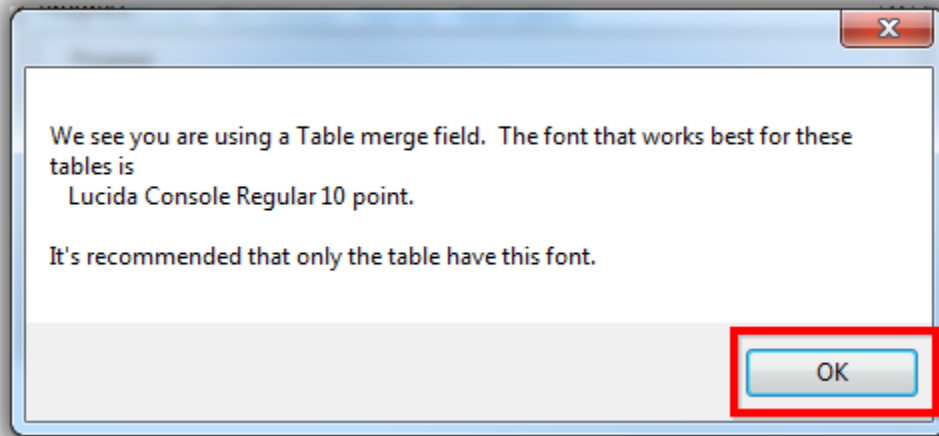
This dialog allows you to specify a subset of the full print job. Depending upon the size of your computer, and the content of the letter, large print jobs may consume an excessive amount of memory. In such cases, you may wish to break apart the job into manageable units. Each template document is 60,852 bytes in size, and there are 41 records being merged, so the full merged document

**Print Preview** **Print** **Cancel**

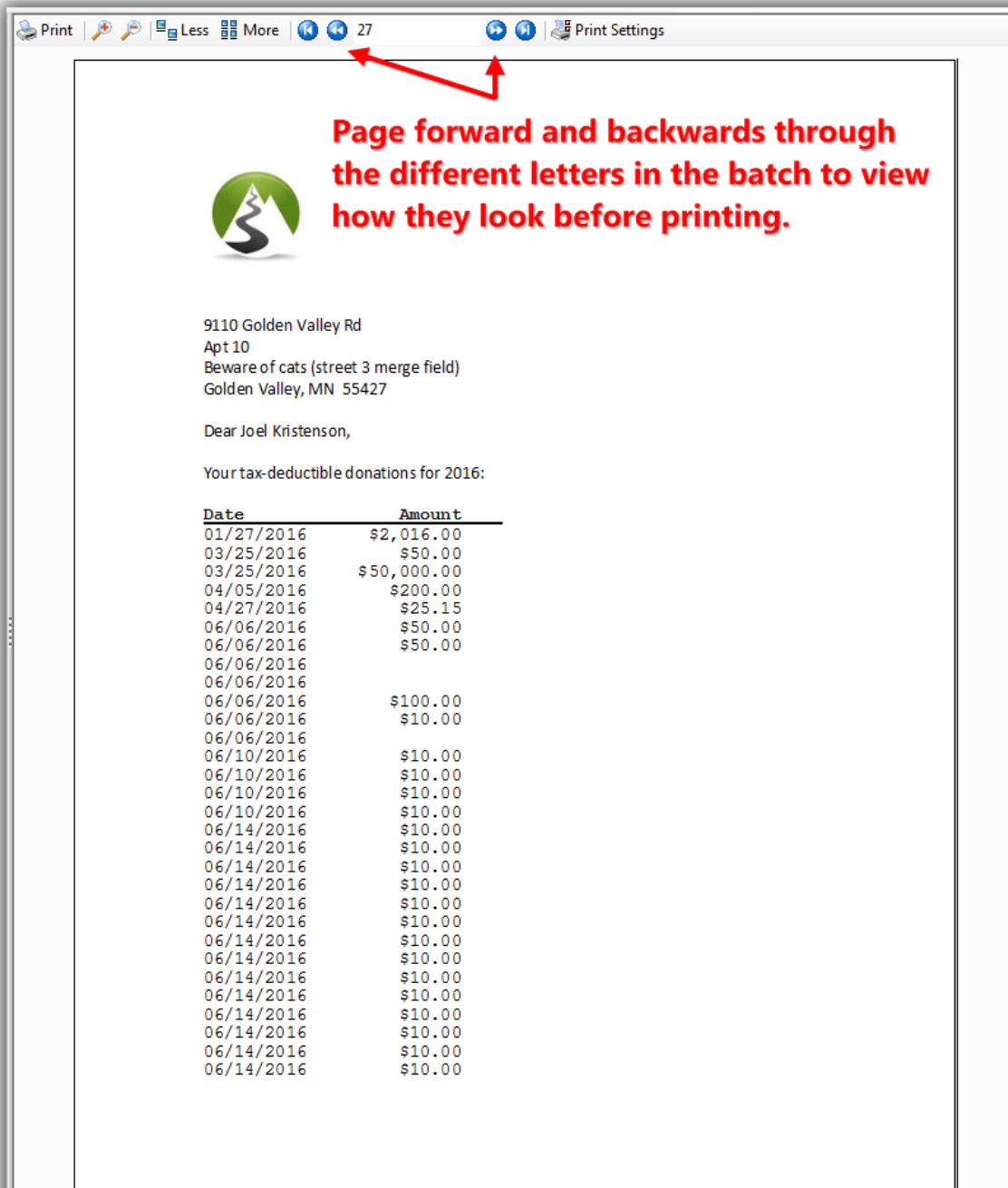
2

1

You may still get a warning message to use the Lucida font at 10pt, if you do, click **[OK]** to proceed.



You can use the **page forward** and **backward** buttons to view how the different letters look in the batch you're printing:



**Page forward and backwards through the different letters in the batch to view how they look before printing.**

9110 Golden Valley Rd  
Apt 10  
Beware of cats (street 3 merge field)  
Golden Valley, MN 55427

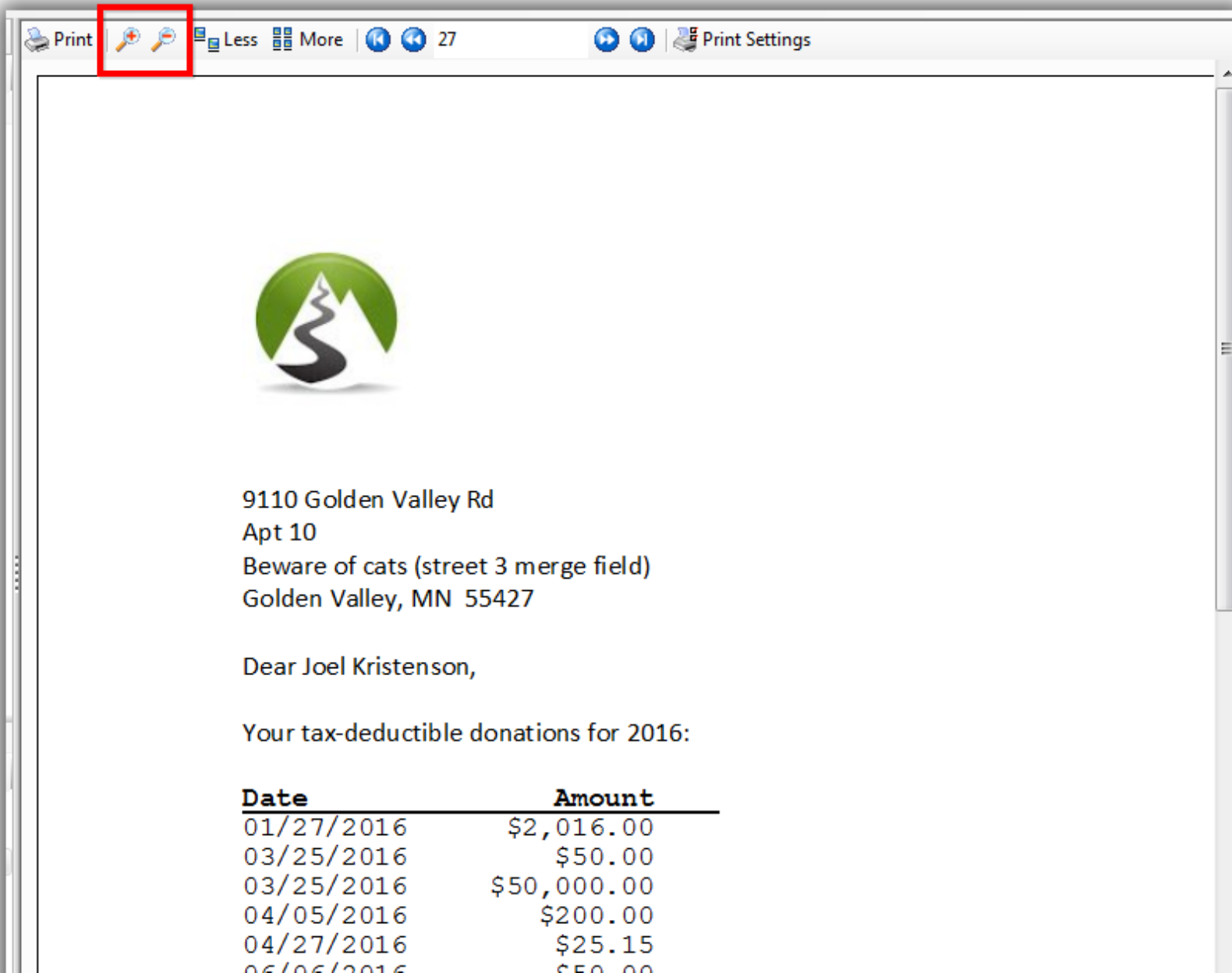
Dear Joel Kristenson,

Your tax-deductible donations for 2016:

<u>Date</u>	<u>Amount</u>
01/27/2016	\$2,016.00
03/25/2016	\$50.00
03/25/2016	\$50,000.00
04/05/2016	\$200.00
04/27/2016	\$25.15
06/06/2016	\$50.00
06/06/2016	\$50.00
06/06/2016	
06/06/2016	\$100.00
06/06/2016	\$10.00
06/06/2016	
06/10/2016	\$10.00
06/10/2016	\$10.00
06/10/2016	\$10.00
06/10/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
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06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00

You can **zoom** in and **out** using the **[+]** and **[-]** buttons:

## Zoom in and out.



9110 Golden Valley Rd  
Apt 10  
Beware of cats (street 3 merge field)  
Golden Valley, MN 55427

Dear Joel Kristenson,

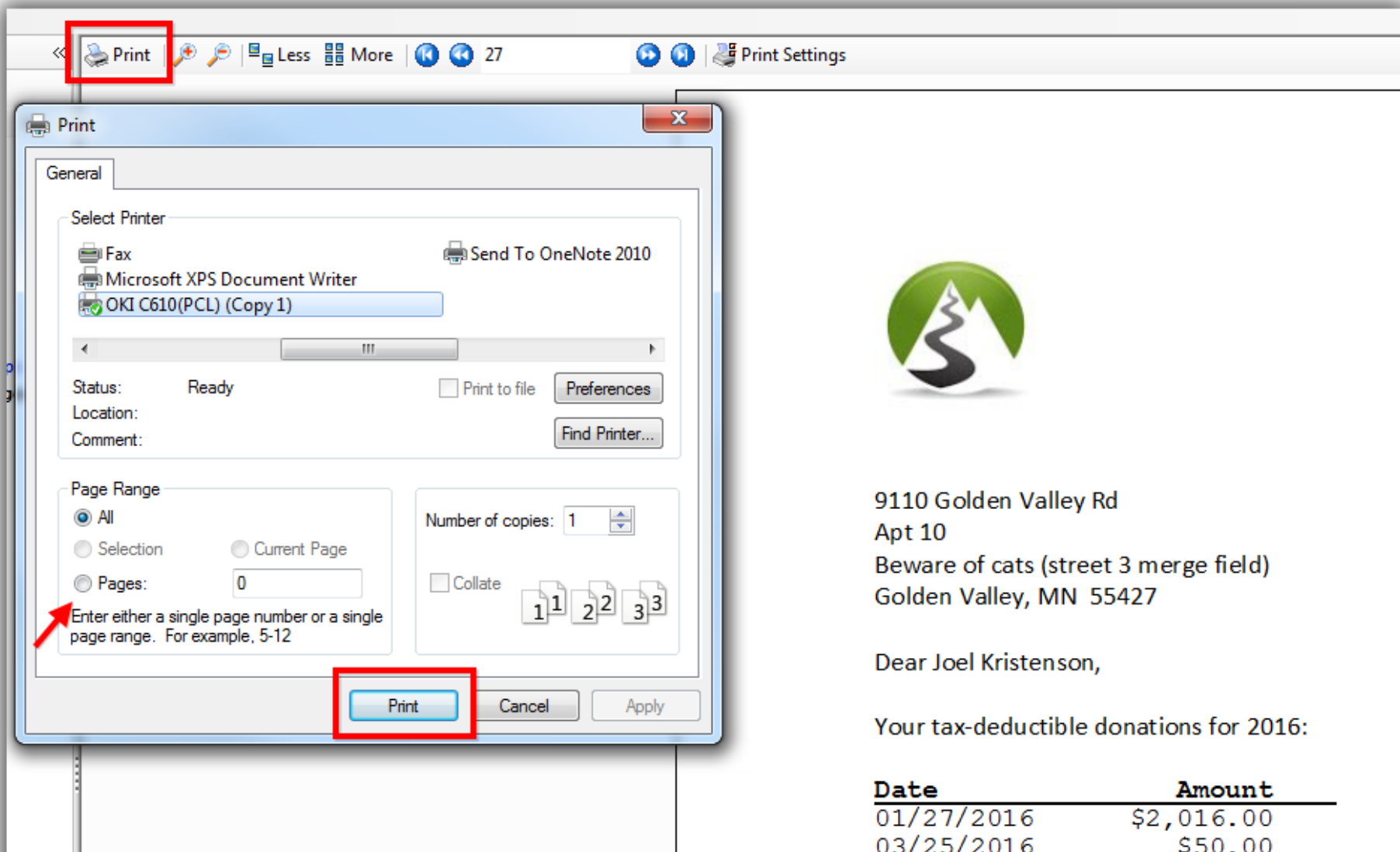
Your tax-deductible donations for 2016:

<u>Date</u>	<u>Amount</u>
01/27/2016	\$2,016.00
03/25/2016	\$50.00
03/25/2016	\$50,000.00
04/05/2016	\$200.00
04/27/2016	\$25.15
06/06/2016	\$50.00

You can run a **test print** by clicking the **[Print]** button in the upper-left, and then select the printer to use. *If you're printing a large batch you can set the **number of pages** to print a small sample:*



**Run a test print before saving your template to verify the margins are correct, the letter head fits, etc. (You can print a range of letters instead of all of them to save on paper).**



The screenshot shows a mail merge letter template with a print dialog box open. The print dialog box is titled "Print" and has a "Print" button highlighted with a red box. The dialog box shows the following settings:

- General tab selected
- Select Printer: OKI C610(PCL) (Copy 1) (highlighted with a red box)
- Status: Ready
- Location: (empty)
- Comment: (empty)
- Page Range: All (selected)
- Number of copies: 1
- Collate: (checked)
- Print button highlighted with a red box

The letter content includes a logo, an address, a salutation, and a table of donation transactions for 2016.

9110 Golden Valley Rd  
Apt 10  
Beware of cats (street 3 merge field)  
Golden Valley, MN 55427

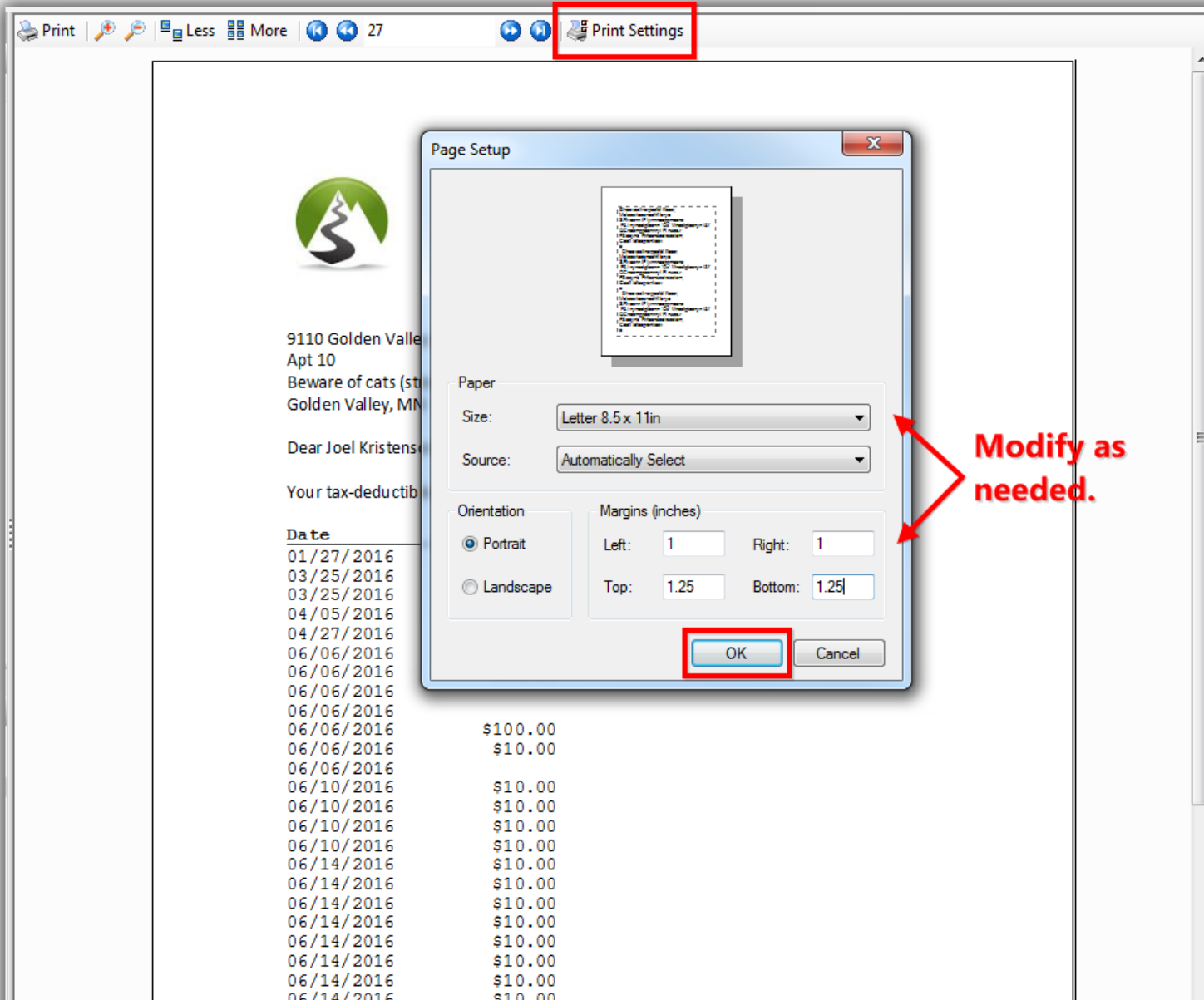
Dear Joel Kristenson,

Your tax-deductible donations for 2016:

Date	Amount
01/27/2016	\$2,016.00
03/25/2016	\$50.00

You can adjust the **margins**, type of **paper**, **orientation**, etc. by clicking the **[Page Settings]** button.

**You can adjust the page settings (margins, type of paper, orientation, etc) by clicking the [Page Settings] button.**



The screenshot shows a mail merge letter in progress. The letter content includes:

- Logo: A green circle with a white mountain and a winding path.
- Address: 9110 Golden Valley Apt 10, Beware of cats (st... Golden Valley, MN
- Salutation: Dear Joel Kristens...
- Text: Your tax-deductib...
- Table header: **Date**
- Table of donation transactions:

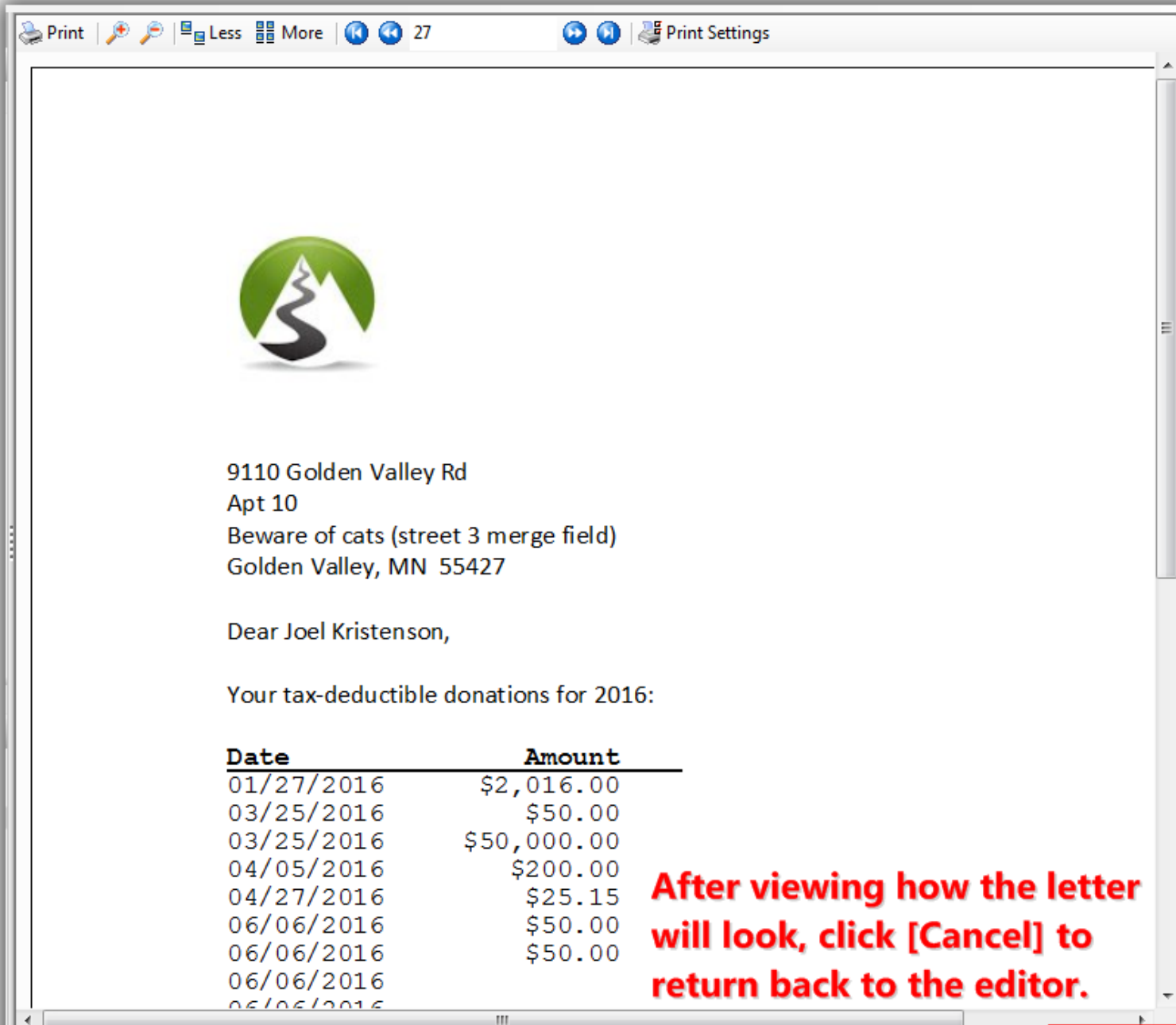
Date	Amount
01/27/2016	
03/25/2016	
03/25/2016	
04/05/2016	
04/27/2016	
06/06/2016	
06/06/2016	
06/06/2016	
06/06/2016	\$100.00
06/06/2016	\$10.00
06/06/2016	
06/10/2016	\$10.00
06/10/2016	\$10.00
06/10/2016	\$10.00
06/10/2016	\$10.00
06/10/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00
06/14/2016	\$10.00

The 'Page Setup' dialog box is open, showing the following settings:

- Paper Size: Letter 8.5 x 11in
- Source: Automatically Select
- Orientation: Portrait (selected)
- Margins (inches): Left: 1, Right: 1, Top: 1.25, Bottom: 1.25

A red arrow points to the dialog box with the text "Modify as needed." The 'OK' button is highlighted with a red box.

Once you're satisfied with the **print preview**, click the **[Cancel]** button in the lower-right to **return back** to the word processor so that you can make further changes, and **save your template** for future use.



9110 Golden Valley Rd  
Apt 10  
Beware of cats (street 3 merge field)  
Golden Valley, MN 55427

Dear Joel Kristenson,

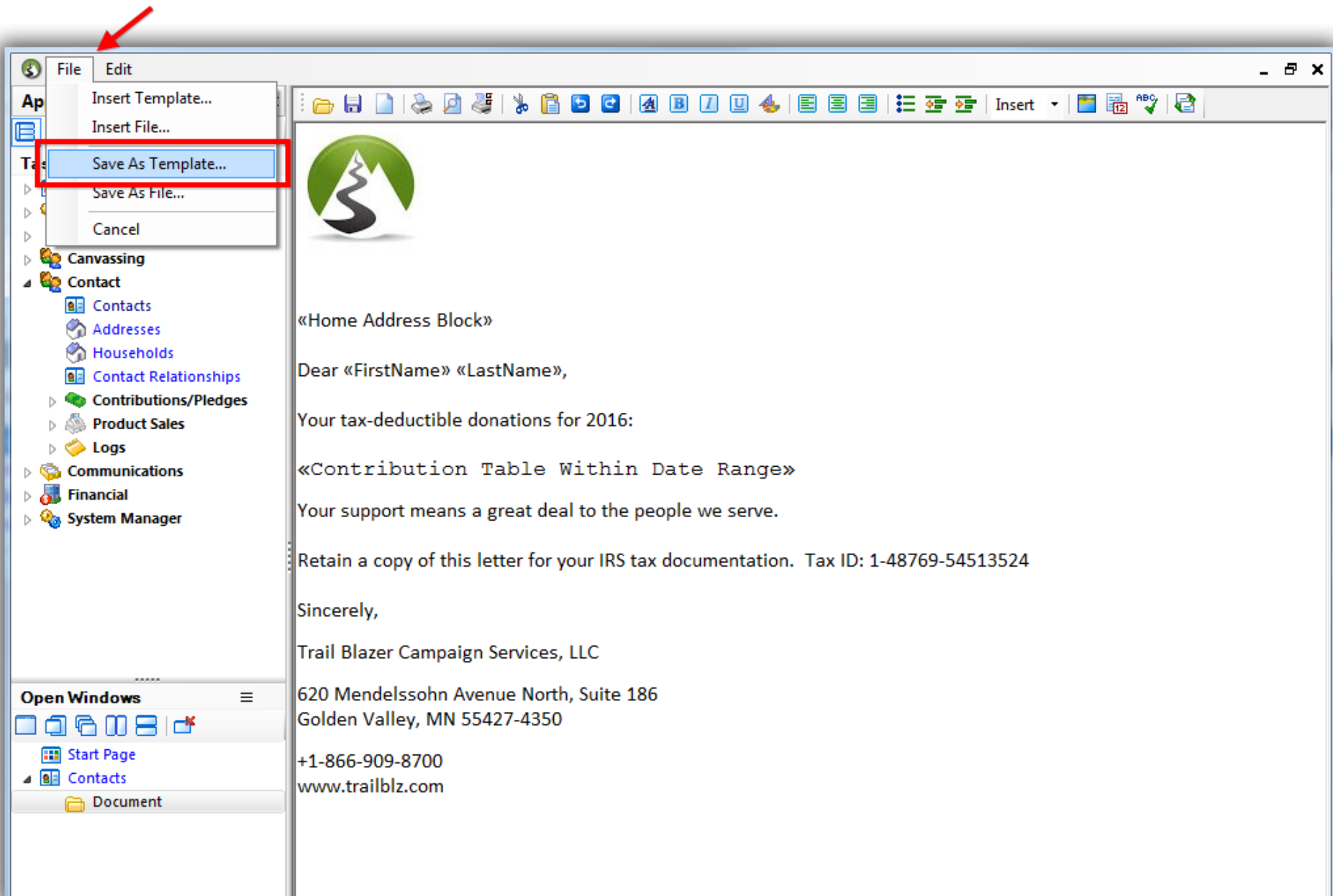
Your tax-deductible donations for 2016:

<u>Date</u>	<u>Amount</u>
01/27/2016	\$2,016.00
03/25/2016	\$50.00
03/25/2016	\$50,000.00
04/05/2016	\$200.00
04/27/2016	\$25.15
06/06/2016	\$50.00
06/06/2016	\$50.00
06/06/2016	

**After viewing how the letter will look, click [Cancel] to return back to the editor.**

Make any additional changes (*re-run the print preview if necessary*), then click the **File** drop-down in the upper-left and select **'Save as Template'**.  
*It's **important** to save as a template vs a file so that the letter is backed up in the cloud and can be used in the future.*

**Save your template in the 'cloud' for future use.**



The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the 'Save As Template...' option is highlighted with a red box. A red arrow points to the 'File' menu. The main window displays a mail-merge letter template with the following content:

«Home Address Block»

Dear «FirstName» «LastName»,

Your tax-deductible donations for 2016:

«Contribution Table Within Date Range»

Your support means a great deal to the people we serve.

Retain a copy of this letter for your IRS tax documentation. Tax ID: 1-48769-54513524

Sincerely,

Trail Blazer Campaign Services, LLC

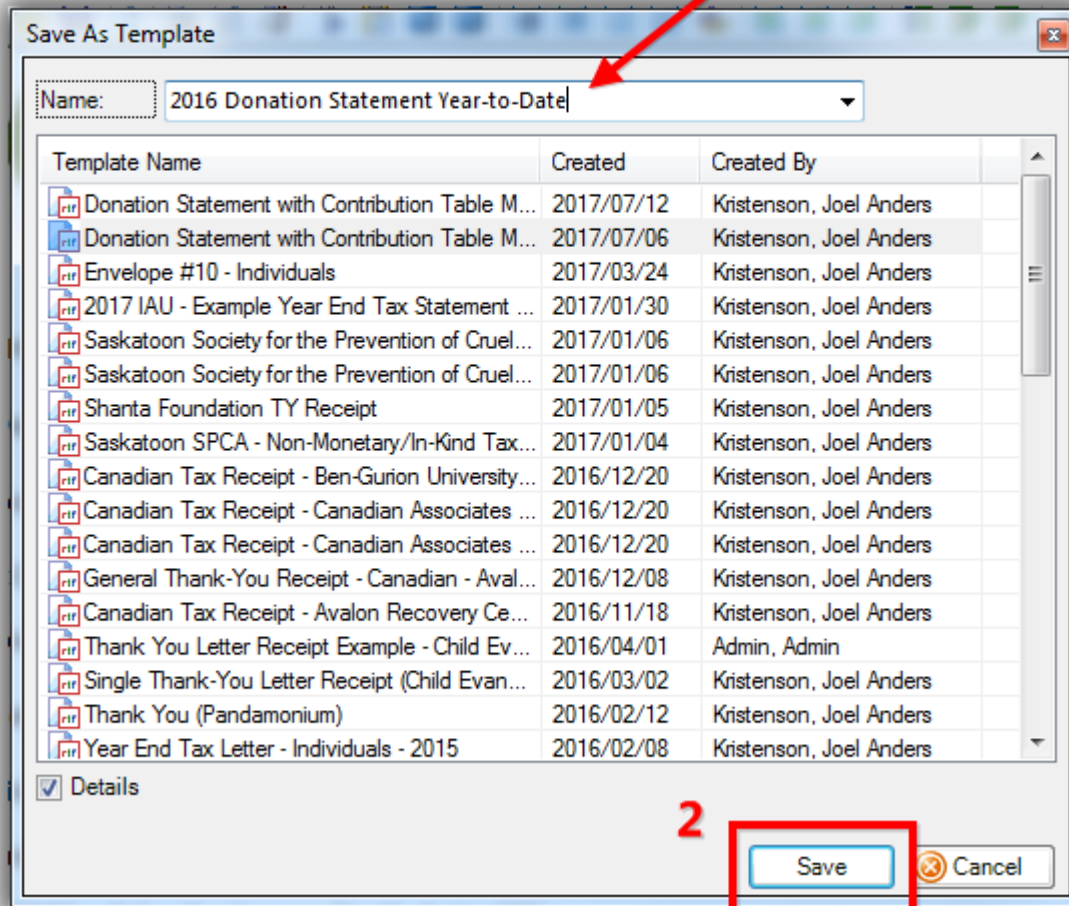
620 Mendelssohn Avenue North, Suite 186  
Golden Valley, MN 55427-4350

+1-866-909-8700  
www.trailblz.com

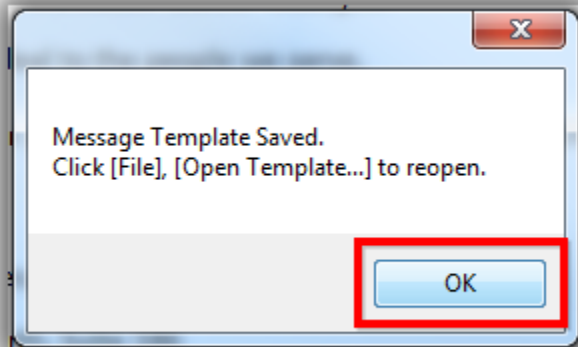
Give the template a **name** and then click **[Save]**. *In my example I called it 2016 Donation Statement Year-to-Date.*



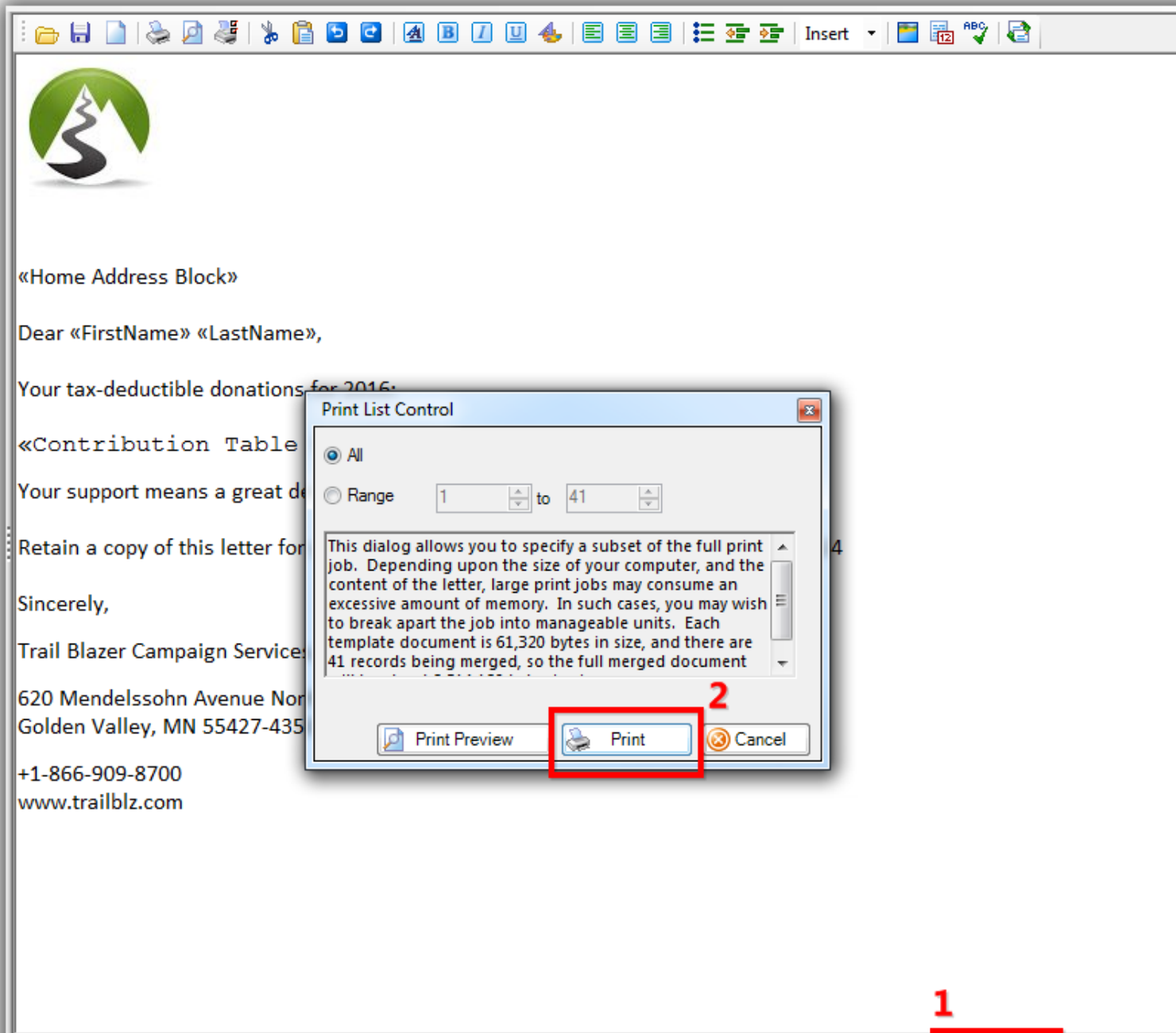
## 1. Give the template a name.



Click [OK] to continue.



Finish **printing** your letters.



The screenshot shows a Microsoft Word document with a mail merge letter template. The letter content includes a logo, a salutation, a subject line, a table placeholder, and contact information. A 'Print List Control' dialog box is open, allowing the user to select a subset of records to print. The 'All' radio button is selected, and the 'Print' button is highlighted with a red box and the number '2'. A red box with the number '1' is also visible at the bottom of the page.

«Home Address Block»

Dear «FirstName» «LastName»,

Your tax-deductible donations for 2016:

«Contribution Table»

Your support means a great deal to us.

Retain a copy of this letter for your records.

Sincerely,

Trail Blazer Campaign Services  
620 Mendelssohn Avenue North  
Golden Valley, MN 55427-4355  
+1-866-909-8700  
www.trailblz.com

**Print List Control**

All

Range    1    to    41

This dialog allows you to specify a subset of the full print job. Depending upon the size of your computer, and the content of the letter, large print jobs may consume an excessive amount of memory. In such cases, you may wish to break apart the job into manageable units. Each template document is 61,320 bytes in size, and there are 41 records being merged, so the full merged document

Print Preview    **Print**    Cancel

1

Take a look at the **related resources** below for links to a variety of other articles and videos related to this topic.



## Trail Blazer

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

## Related Resources

Article: [Mail Merge – Write a Letter](#)

Article: [How to Create a Year-End Tax Letter Addressed to Individuals or the Entire Household using Merge Fields – Nonprofit Only](#)

Article: [How to Print Envelopes](#)

Article: [How to Print Household Labels](#)

Article: [\(Mail-Merge\) – How to Write a Letter, and Save it as a Template](#)

Article: [Mail-Merge – Write a Letter](#)

Article: [How to Print Mail-Merge Address Labels](#)

Video: [Getting Started 107 – Writing Contribution Thank You Letters](#)

Video: [Year End Tax Letter](#)

Video: [Getting Started 102 Beginning Queries – Nonprofit](#)

Video: [Write Letter – Edit Letter after Mail Merge](#)

## Trail Blazer Live Support

☎ Phone: 1-866-909-8700

✉ Email: [support@trailblz.com](mailto:support@trailblz.com)

Facebook: <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

Twitter: <https://twitter.com/trailblazersoft>

*\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

*[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.*

*\* After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

*\* This service is included in your contract.*